Northwestern | OFFICE OF HUMAN RESOURCES

September 2024 Human Resources Operations, Payroll and Tax Updates

Colleagues,

We hope you find the information below helpful as we move through the fall hiring season.

- For further assistance on any item below, please contact askHR@northwestern.edu.
- To link to this newsletter online, please see the top right box on HR Operations Document Submission: Human Resources - Northwestern University.
- To be added to this listserv (*myHRPROCEDURES*) please follow these steps: https://services.northwestern.edu/TDClient/30/Portal/KB/ArticleDet?ID=1464

Human Resources Operations, Payroll, Tax and Support

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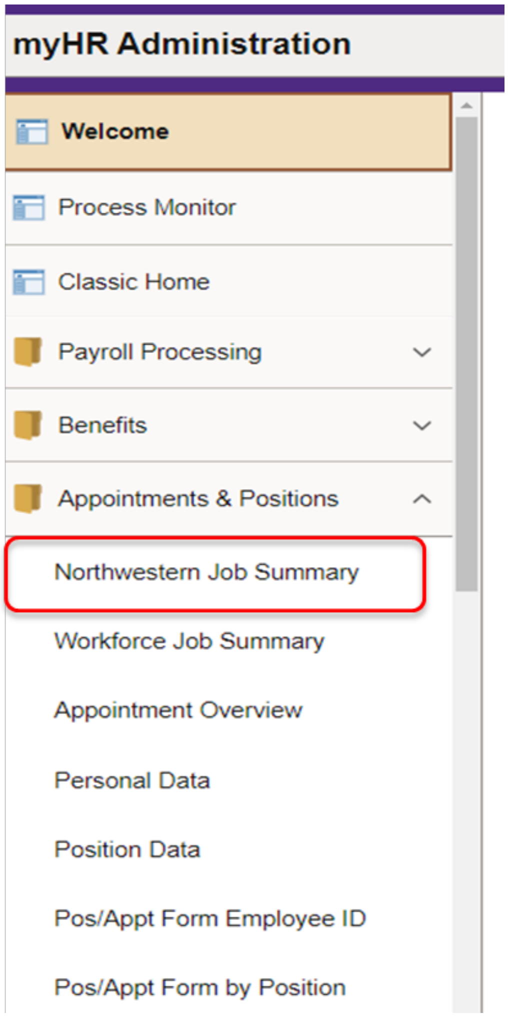
THE MIGHTY NORTHWESTERN JOB SUMMARY PANEL: Quiet and unassuming hero

If you remember nothing else from this newsletter, please remember (and learn more about) our friend and yours: the Mighty Northwestern Job Summary. It is the first place we in Operations and all school and unit payroll folks should visit before hiring.



When hiring someone, inadvertently creating a duplicate ID for that person creates havoc for everyone – Ops, Payroll, SES, IT support, security admins, you as managers – but especially for the employee.

To avoid this headache, **visit the Northwestern Job Summary page first** to determine whether the new person already has an Employee ID or StudentID. You cannot say for certain that they don't have an existing ID until you have searched by *both* SSN *and* Date of Birth and gotten no results for either. *(If your employee is submitting their personal data form electronically via OnBase, you will not have the information to perform this step.)*

For anyone who does provide an EmplID, you should still start with Northwestern Job Summary to confirm it (and possibly uncover previously unknown duplicate IDs).

Do not rely on merely asking the new hire – people may have Admissions application records and Professional Studies IDs they don't even know about or previous work they've forgotten about.

Also do not rely on myHR pages such as *Personal Data, Appointment Overview, and Manage Job*. These pages aren't able to uncover records in CAESAR and won't show you folks outside your own department—**only Job Summary can do that!** This small but mighty page searches both CAESAR and myHR, and it is the only myHR page not limited by your myHR department level access so you can view basic employment information for anyone at the University.

Start your hiring process at Northwestern Job Summary!

NEW POSITION/APPOINTMENT FORM TRAINING COMING SOON!

We heard you! A new training module focused specifically on Position/Appointment Forms (PAFs/AFPFs) is coming soon to a myHR Learn near you. An announcement will be sent to this myHRPROCEDURES listserv when the training is available.

TIPS, DOS AND DONTS WHEN SUBMITTING POSITION/APPOINTMENT FORMS...

We in Operations can most quickly get your staff, faculty and graduate student position/appointment forms processed when they are complete, accurate and submitted on-time. We have an updated webpage available with tips, do's and don'ts when submitting PAFs. Remember: temps (work-studies, student temps, non-student temps and special pay) are not hired using PAFs.

Here are some hiring highlights:

POSITION/APPOINTMENT FORM QUICK RULES

Both the Position Data and the Appointment sections of the form required

- Even if changes to only one section, submit both

New person in a new position:

- Complete Blank form for both Position and Appointment.

New person in an existing position:

- Print existing myHR Position form but use blank Appointment form (not the last person's Appt form)

Continuing person in their current Position:

- Use and edit existing Position and Appointment forms

For editing existing forms:

- **Do** open and edit in Adobe Pro
- **Do not** scratch out, white out, or black out the old information.
- **Do** strikethrough (single horizontal line through) the existing data that needs to be changed. Enter new information above or next to crossed out old data.
- **Do** type. Typing is preferred to handwriting.
- **Add** a note if correcting a previous form

Enter correct Action and Reason Codes

- Check out the Action/Reason Matrix. Codes on page 1 for Position side and Codes on pages 2-7 for Appointment side.

FUNDING QUICK RULES

HR Ops enters position funding for the following:

- All new positions
- All temp changes - new and continuing
- Emeritus positions
- Positions in non-deployed departments

Done by department:

- All other changes to the position or job (e.g., reclass, new incumbent in existing job, reappointments)

WHEN WILL MY HR OPERATIONS REQUEST BE PROCESSED?

Documents submitted to HR Operations from now until the end of October are expected to take at least 10 business days for processing. As of this writing, there are 500 position/appointment forms pending processing, almost 350 of them for 9/01. There are also almost 360 temp hires. Our team is working as quickly as possible to get these processed.

Need your request's status? Please a) wait 8-10 business days from submission and b) confirm the request is not on Job Data in myHR > Navigator > Job Data before reaching out for request status. If 8-10 business days have passed since submission, **and** the change is not on Job Data, email Julie Phelan, HR Operations Manager directly.

Requests to expedite processing: We are often asked to move a request up in the queue, and unfortunately cannot do so except in rare circumstances, e.g. an immediate need for medical care. Please email all requests for urgent processing directly to Julie Phelan.

MY PAPERWORK WAS LATE. WHEN WILL MY PERSON BE PAID?

A payroll is considered closed once the “confirm” is run. Once the payroll confirms, a payment cannot be stopped or modified - no changes can be made to it except on a future payroll. Any paperwork submitted for a pay period that has already confirmed is known as a “retro.”

Need to pay a retro? **There is no charge to pay a retro on the recipient’s next regular pay date**.

- If you require the retro payment earlier, a $100 fee will be assessed to place the payment on any pay date, or to create a paper check, earlier than the employee’s regular date. Paper checks are created on Tuesdays and Fridays.
- If a retro (anything earlier than the next regular pay date for that employee) is requested, the chartstring **must** be submitted with the online submission.
- *View payroll confirms on the Payroll Calendars (NetID required)*

An exception here is non-exempt (hourly) employees for whom timecard amendments have been entered. Timecard amendments that are entered – **and approved** – by Saturday evening will be paid out on the next available payroll run, with no request or fee required from the department.

WHY DID MY TEMP’S RECORD TERMINATE? 90+ Day Terminations

Every 90 days – in November, February, May and August – we identify all temp records not paid during the past 90 days and run a process to terminate those records. These quarterly dates are included on the Payroll calendar.

If your temp record is terminated and the person will begin working, please upload a temp hiring request to have them rehired. These rehires will not be prioritized over other pending temp hires.

The query below provides the last pay date for temp workers. By adding 90 days to the date in the query, an expected termination date can be estimated.

- *myHR > Workforce Administrator > Reports > Public Queries > All Active Temps*

WHEN ARE SOCIAL SECURITY NUMBERS REQUIRED FOR TEMP PROCESSING?

A number of years ago HR Ops required an SSN in order to process a temp hire or special pay. For the last few years this has changed, and payment requests for temps and special pays have two options when submitting hiring paperwork:

- Provide the employee’s United States Social Security number OR
- Attach their receipt from the Social Security Administration showing that an SSN has been applied for

If an SSN or receipt is not attached to the upload, the request will be rejected and must be resubmitted when either of those becomes available.

WHEN IS I-9 REQUIRED? Look at the chartstring's account code

Payments on account codes beginning with **6xxxx** (staff, faculty, temps, RA, TA, GA) require I-9, as the IRS considers these wages (and wages always require an I-9).

Payments on account codes beginning with **7xxxx** (e.g., scholarship, REU) do not require I-9.

If someone is receiving **both** 6xxxx and 7xxxx, an I-9 is required – and must be completed by the fourth day of work. **This applies to graduate students moving from first-year scholarships to TA/RA/GA/temp – once 6xxxx account codes are paid from, students must complete their I-9.**

Regardless of account code, Foreign Nationals **always** need to complete FNIS.

HELP! MY EMPLOYEE'S NETID EXPIRED

If a delay in reappointment, or an expired NetID, would disrupt your unit's or employee's work, please make sure to submit all reappointment paperwork the month before the expiration date (for example, appointments ending on October 31 should be submitted in September). Late rehires will not be prioritized over other pending work.

- *myHR > Workforce Administrator > Reports > Position Management > NWPOS001 Expiring Appointments*

I AM PAYING TAXES IN TWO STATES?

Initial setup of state taxes at hire is automated based on the address on the Personal Data form submitted at hire. Illinois is always added, and - if the Personal Data form indicates an address outside Illinois - that state is automatically added as well. Many employees who applied from outside Illinois, but have since moved to Illinois, are *not* aware that they are taxed in multiple states.

And – once set up – the state tax setup is **not** triggered again when an employee edits or removes or adds a state in their home address. Instead, to modify the states one is taxed in, an employee must explicitly ask for a change using a form.

- View more information online about address and state taxation

ELECTRONIC W2s: Get It Electronically

Please help HR get out the message about electronic W-2s. If you or those you pay have not already done so, we strongly encourage all employees to obtain their W2s electronically via myHR instead of U.S. mail. There are several benefits:

- **Instant Access:** Employees get their W-2 as soon as it's available, without waiting for mail delivery.
- **Environmentally Friendly:** Reduce paper waste and contribute to sustainability efforts (and reduces costs!)
- **Secure Delivery:** Electronic W-2 will be accessible only to employees through our secure system – no social security numbers being sent in the mail.

Please encourage employees in your areas to take 2 minutes and simply sign into myHR at https://myhr.northwestern.edu, select the "Pay" tile, and choose "W-2 Electronic Consent."

Those that do not choose electronic delivery must still log into myHR – ideally before Winter Recess - to ensure their home address is up-to-date to receive their paper W-2.

WORK-STUDY: What you need to know for Fall 2024

As many know, it has been a tumultuous year in the financial aid world. Not only were there significant FAFSA delays but the federal methodology also changed. This means that not all students who had Federal Work Study (FWS) in years past were offered FWS for 2024-25.

Ask your student to confirm their FWS 2024-25 FWS eligibility in CAESAR > Financial Aid > View Financial Aid before you update their funding - see below for details.

STUDENT EMPLOYMENT SALARY FUNDING

<u>Departments are responsible for managing student funding throughout the year</u>. myHR Administrator access is required to review the following:

1. Check to see if the employment record is active in myHR > Manage Job.
    - If not, upload a new temp hiring request to HR Operations.
2. Check the salary account code and funding dates for the student in the myHR > Temp Funding Panel. *If your student inadvertently earned FWS wages during the summer, not only were those wages journaled back to your department as Regular Student Wages, their Temp Funding Panel was also updated to Regular Student Wages.*
    - 60122 = FWS wages

- 60120 = Regular Student Wages

- The account on the current row next to the chartstring does not need to match the default code assigned to the job title at the top of the screen.

- Funding should be listed as 100%. Payroll automatically applies the federal wage subsidy on each pay date.

- Be mindful of the stop/start dates assigned to the rows, review if there is a position/assignment end date (if applicable), double check your chartstring activity dates and ensure your chartstring will remain open and active for the duration of the time the student will be working for your department.

FWS IMPORTANT DATES AND NOTES

- **FWS is exclusive to the fall, winter, and spring quarters only. September 15, 2024, is the first day eligible students may earn FWS wages for 2024-25.**
  - Students must be registered/enrolled to earn FWS wages. Students studying abroad may not earn FWS wages.
  - If your student will work before this date and they are FWS-eligible for 2024-25, they must be paid with Regular Student Temp wages.
- FWS Employer Quick Guide is now available.

FWS NEWSLETTER

Do you oversee student employment record management including hiring, payroll, and routine updates? You are invited to join the FWS employer mailing list which provides timely newsletter topics and information to help you in your role.